ProjectWise Advertising Workflow

Quick-Start Guide

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Here are the basic steps to prepare and move a project from the design phase to advertising within the ProjectWise environment.

General:

1. Each group works in their respective project's **Working Directory** & **User Interface** in ProjectWise "**UDOT Projects**" Environment.

2. Files modified by multiple groups should be placed in the project's Working Directory "**1 Design Submission**" which is a general working area and most groups have write access there.

3. Choose the correct *Document Type* attribute (Required field) for the documents brought into ProjectWise such as certifications, agreements, contracts or drawing files etc. Also note that some document types (those marked with an asterisk) have associated sub-types which can be chosen from the *Document Subtype* field.

Design:

1. **CADD Sheet files** need to be electronically signed in MicroStation.

2. *Set Final Status* for the CADD Sheet files and their reference files and other non-CADD documents required for advertising (**except for specifications**, which will be modified and set final status by Advertising. PDF specifications sets are covered later in this document) so that no one can make changes on the files while in the advertising process. Also for non-CADD documents check the *Mark for Advertisement* attribute

> **Note:** Once Final Status is set on any document, Final Status can be removed **only** by a ProjectWise Administrator.

3. **PDF Plan Sets:** These can be created using the **iPlot Organizer** application.

> Create three PDF plan sets, one for advertising to contractors, one for advertising to the public, one to create the award set.

> **The Advertising PDF plan set:** This is the contractor plan set. The file-naming convention for this is *project-number*_**adv.pdf**. The first page of

this PDF plan set is the title sheet with Adobe digital signature fields. The Design Engineer saves the file as sign-able in Adobe Reader. The Design Engineer digitally certifies, allows form fields and signs the title sheet. The remaining approval Adobe digital signatures are added to the title sheet.

For the entire signed **Advertising PDF plan set file**, select the appropriate document type in the *Submit to Electronic Plan Room* field, normally as "Plan – (Plan Set)", check the *Mark for Advertisement* attribute and *Set Final Status*.

The Public PDF plan set: This is the public plan set. The file-naming convention for this is *project-number_***public.pdf**. This PDF plan set must not contain any structural details, as set forth in current **Homeland Security** policy. Also make this PDF plan set **unprintable**.

If the project has no structures, this can be a copy of the Advertising PDF Plan Set, but with the correct naming convention. Either way, this file must be created for the Web site to properly function.

No Adobe digital signatures are required for this PDF plan set.

For the entire **Public PDF plan set file**, select the appropriate document type in the *Submit to Electronic Plan Room* field, normally as "Plan – (Plan Set)" and check the *Mark for Advertisement* attribute.

The Award PDF plan set: The file-naming convention for this is *project-number_***award.pdf**. This PDF plan set will be used later in creating an Award plan set if addenda are necessary after submitted to Advertising. To start, this PDF plan set will be an exact copy of the Advertising PDF plan set, but will not have any digital signatures nor any other attributes, etc. until the project is ready for award, and will be processed as described in the **Award** section of this document.

4. **PDF Specification Sets:** These comprise the specifications book.

Create two PDF specification sets, one for advertising to contactors, one to create the award set.

The Advertising PDF specification set: This is the contractor specification set. The file-naming convention for this is *project-number_***adv_set.pdf**. At this time, Adobe electronic signatures are not required for this PDF specification set.

For the entire **Advertising PDF specification set file**, select the appropriate document type in the *Submit to Electronic Plan Room* field, normally as "Spec – (Specifications)", check the *Mark for Advertisement* attribute.

> **Note:** The **PDF specification set** document is **NOT** *Set Final Status* at this time. This will be done in the **Central Construction for Advertising** workflow described later in this document, since that document will be modified at that time.

> **The Award PDF specification set:** The file-naming convention for this is *project-number_**award_set.pdf**. This PDF specification set will be used later in creating an Award specification set if addenda are necessary after submitted to Advertising. To start, this PDF specification set will be an exact copy of the Advertising PDF specification set, but will not have any attributes, etc. until the project is ready for award, and will be processed as described in the **Award** section of this document.

5. **For various support CADD files**, mainly civil data such as surfaces, alignments, etc., or any documents to be made available to the contractors on the Web site, select the appropriate document type in the *Submit to Electronic Plan Room* field, normally as "CADD – (CADD File)", or whatever is appropriate. *Set Final Status* for the support CADD files so no one can make changes on the files while in the advertising process.

Project Management:

1. The Project Manager reviews and approves the final design, QC/QA package, certifications, contracts, cooperative agreements, etc. Use the project's *Marked for Advertisement* Global Saved Search to verify that these files are properly attributed.

2. The P.M. Technician uses the project's *Marked for Advertisement* Global Saved Search to verify that advertising documents (certifications, agreements, etc.) are in *Final Status*.

> **Note: Specification** documents, including the **PDF specification set**, are **NOT** *Set Final Status* at this time. This will be done in the **Central Construction for Advertising** workflow described later in this document, since those documents will be modified at that time.

The P.M. Technician also compiles all documents for submission to Advertisement per **Check List** & **Task List** with correct attributes.

3. The P.M. Technician notifies the **Planning & Programming** and the **Central Construction for Advertising** groups that project documents are in place and ready for their processing.

Planning & Programming:

1. The Analyst uses the project's *Marked for Advertisement* Global Saved Search to review the document package submitted by Project Management.

2. The appropriate documents (T-725, R-709, etc.) are prepared and approved and placed in the project's Working Directory "**Planning and Programming**" folder. Select the appropriate document type for each file in the *Document Type* field, normally as "Funding Documents *" and also select the appropriate subtype in the *Document Subtype* field, such as "R-709", etc.

3. The Analyst will check the *Mark for Advertisement* attribute and *Set Final Status* for the funding documents that are included in the Advertising List.

4. The Analyst notifies the **Central Construction for Advertising** group that project documents are in place and ready for their processing.

Central Construction for Advertising:

1. The Advertising Coordinator reviews the project's document package submitted by the **Project Management** group. Use the project's *Marked for Advertisement* Global Saved Search to find these files.

2. The Advertising Coordinator will finalize the **PDF specification set** and *Set Final Status* on that document.

3. The Business Analyst uses the project's *Submit to EPR* Global Saved Search to find the files to be included in the EPR. Then uses the ProjectWise **Distribution Utility** to publish the files online to two different types of views, public view and contractor view, using files specified in the **Design** section of this document.

Addendum:
The Quick-Start instructions for the Addendum process are still under development.

Award:
The Quick-Start instructions for the Award process are still under development.

5.12 Sample Documents in UDOT Advertising List

Note: The following information is preliminary and shown for information only at this time.

In the following table, we list different types of advertising documents including Signed Right of Way Certification, Funding documents T-725 or R-709 forms… etc, and what attributes should be used for the files.

Advertising Documents	Submit to Electronic Plan Room	PW Document Types / Document Subtypes	Mark for Advertisement?
Interface: Environmental	Submit to Electronic Plan Room: Spec — Plan - (Plan Set) / Spec - (Specifications) / Misc - (Misc Advertising Documents) / Addendum - (Addendum Documents) / Not Included - (Not Included in Advertiser	Document Type (Req'd Field): Cert	☑ Mark for Advertisement?
Advertising TOC (Table of Content)		General	X
Signed ROW, utilities certification		Cert	X
Contractual, Structure, Bridge Maintenance, Traffic & Safety, Civil Rights and ATMS memos		Memos	X
QC/QA Bridge Design Certification		Cert	X
T-725, R-709 Forms		Funding Document * - T-725/ R-709	X
Engineer's Estimate Approval Form		Estimates	X
Local Governments betterments		Agreements	X
Assignment Order Form C-050		General	X
Memo for Maintenance, ATMS, and Structure Maintenance Projects. Signed Environmental Study for Maintenance projects		Memos	X
Risk Assessment Checklist OCIP Requirements		Memos	X
Signed co-op agreement		Co-ops	X
Signature page from Project Design Criteria (PDC) required		Reports * - PDC	X
Environmental Study front page and signature page required		Reports * - Environmental	X
Deviation Report		Design Exceptions * -	X
Mandatory Pre-Bid	Spec – Specifications	General	X

Advertising Documents	Submit to Electronic Plan Room	PW Document Types / Document Subtypes	Mark for Addendum?
a. Assemble Special Provision and Supplemental Specifications Book; b. Lane Rental c. Price Plus Time Bidding d. Pre-Bid Conference e. Create Special Provision and Supplemental Specifications Book	Spec – Specifications *(Design Submission Folder)*	Specifications	X
Plan Set (pdf file) a. Certified & Signed b. Set Final Status	Plan – Plan Set *(Design Submission Folder)*	Plan Set	X
Digital Signed IPS (See instruction **5.9** how to create IPS set)	Misc – Misc Advertising Documents	General	X
CADD files a. Digitally Signed b. Set Final Status for files and their references	CADD – CADD files	Drawing files * - Border/ Design/ Existing/ Proposal/ Sheet	
Notice to Contractors	Spec – Specifications	General	X
Bidder's Schedule	Spec – Specifications	General	X

5.13 Sample Documents in UDOT Addendum Check List

Note: The following information is preliminary and shown for information only at this time.

Advertising Documents	Submit to Electronic Plan Room	PW Document Types / Document Subtypes	Mark for Addendum?
CADD files a. Use Addendum Naming Convention (XXX_AD2) b. Replace digital signatures on the save as addendum files c. Set Final Status for the files and their references d. Find Referenced By inform others to create Addendum because of the changes on base file	CADD – CADD files	Drawing files * - Border/ Design/ Existing/ Proposal/ Sheet	
Addendum Plan Set a. No title sheet for the Addendum Plan set b. Set Final Status	Plan – Plan Set *(Design Submission Folder)*	Plan Set	X
Other addendum documents a. Set Final Status		Cert/Specifications/etc	X

5.14 Sample Award Documents in UDOT Award Check List

Note: The following information is preliminary and shown for information only at this time.

Following table is guidance on how to attribute a sample list of award documents.

Award Documents	Document Types	Mark for Award?
Award Plan Set a. User unsigned plan set created at advertising stage b. Replace the sheet with the latest addendum in pdf c. Set Final Status	Plan Set	
Project Manager Abstract Approval	E-mail * - Received/sent	X
Surety 2000 Bid Bond Authorization & Copy received from Contractor	Cert	X
Utah Contractor License Verification	General	X
Local Government Concurrence	Letters * - Received/sent	X
Approved Abstract	Contracts	X
Notice of Award	Contracts	X
Request to Print Shop	E-mail * - Received/sent	X
Contracts sent to Contractor	Contracts	X
Contracts from Contractor	Contracts	X
Liability & Workers Comp Insurance	Cert	X
OCIP	Cert	X
Railroad Insurance (if applicable)	Cert	X
Approved DBE	Letters * - Received/sent	X
Bonding Company Verification	Cert	X
Insurance Company Verification	Cert	X
Carlos signed Proceed Letter	Contracts	X
Notice To Proceed	Contracts	X